DIRECT IMPACT:

How TV Drives Outcomes for Direct-Disruptor Brands

2018 REPORT

VAB
VIDEO ADVERTISING BUREAU

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Five Years and Counting of Tracking TV Spending from Digital-Native, Data-Driven, Direct-Disruptor Brands

Back in 2014, the VAB began following the effect of TV spend on digital-native brands with **"What's Driving Digital,"** a look at what triggers online traffic and revenues for 75 "pure-play" internet brands such as Priceline, E*Trade & Overstock.

Then in 2016, we released **"What's App'ning!!: The TV-Traffic Correlation for Mobile Apps"** which served as a category case study illustrating the correlation between TV spend and app traffic for 60 mobile apps across 10 categories.

In 2017 came our analysis exploring the effect of TV spend on key brand metrics such as website traffic, online interactions and revenue/sales for a robust set of 35 category disruptors - like Airbnb, Wayfair and Zillow – called **"The Market-Changer's Playbook: Why TV Is Where Disruptors Go To Grow Big."**

Each report highlighted how marketers implemented TV campaigns to take their brands to the next level of growth.

Now in our fifth year, join us in our latest release, **"Direct Impact: How TV Drives Outcomes for Direct-Disruptor Brands,"** as we examine the effect of TV spend on the business outcomes of 50 "direct-disruptor" brands…

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Direct Impact: How TV Drives Outcomes for "Direct-Disruptor" Brands

Commerce is experiencing an unprecedented evolution. Technology-driven transformation has permanently altered consumption habits and behaviors, which has given rise to a series of new "direct-disruptor" brands across countless product categories.

Whether it's *Peloton* for fitness, *Gwynnie Bee* for personal shopping or *Hello Fresh* for food delivery, many of these brands are effectively challenging long-time category market share leaders and are considered brands of the future.

But the future is now for these digital-native, data-driven companies that are looking for immediate action at scale from consumers in the short term while also embarking on longer-term brand building strategies to separate themselves from the competition.

In this report, *Direct Impact*, we examine the TV spend of 50 "direct-disruptor" brands in relation to available brand metrics such as website traffic, online interactions and revenue / valuations to determine what, if any, correlations exist.

After crunching the numbers, the figures clearly show that TV investments drive major business outcomes for these digital-native, data-driven, direct-disruptor brands.

Continue on to learn more about the direct impact of TV spend on key brand metrics…

Direct-Disruptor Brands Summary

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"Direct-Disruptor" Definitions

"Direct-disruptors" are digital-native brands that sell, or otherwise provide, goods and services directly to consumers. First-party data collection, as well as performance measurement and analytics, are core competencies of these companies.

With cutting edge analytic tools and a team of data scientists at their disposal, media channels are scrutinized and optimized on a real-time basis. As a result, their media investment reflects, with near precision, the most effective and efficient sales drivers for their business.

However, "direct-disruptor" brands exist across a multitude of categories, serve a myriad of consumer purposes and can be at a different business lifecycle/maturity relative to other brands which can make "like-for-like" analysis comparisons challenging.

For the purposes of this report, we separated the 50 direct-disruptor brands we analyzed into one of two groups based on similar characteristics:

- ***"Emerging" Direct-Disruptor Brands*** – newer brands with an average age of 8 years that have only been investing in TV since 2015 (two years on average)
- ***"Expanding" Direct-Disruptor Brands*** – brands with an average age of 15 years that have been investing in TV for at least the last four years (eight years on average)

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50 "Direct-Disruptor" Brands Analyzed Across Many Categories

We analyzed the TV spend and individual key metrics (where available) like website traffic, online interactions and revenue of these 50 brands across 30 categories

"Emerging" Direct-Disruptor Brands

"Expanding" Direct-Disruptor Brands

The above list represents a mix of brands across "direct" categories who invested $500K+ in measured 2017 TV spend (Nielsen AdIntel) and have available data within at least one of the following business metrics: website traffic unique reach via comScore, online interactions via iSpot.tv, or revenue / valuation estimates through reliable & verified sources such as SEC.gov, Pivotal Research or company press releases / company representative statements.

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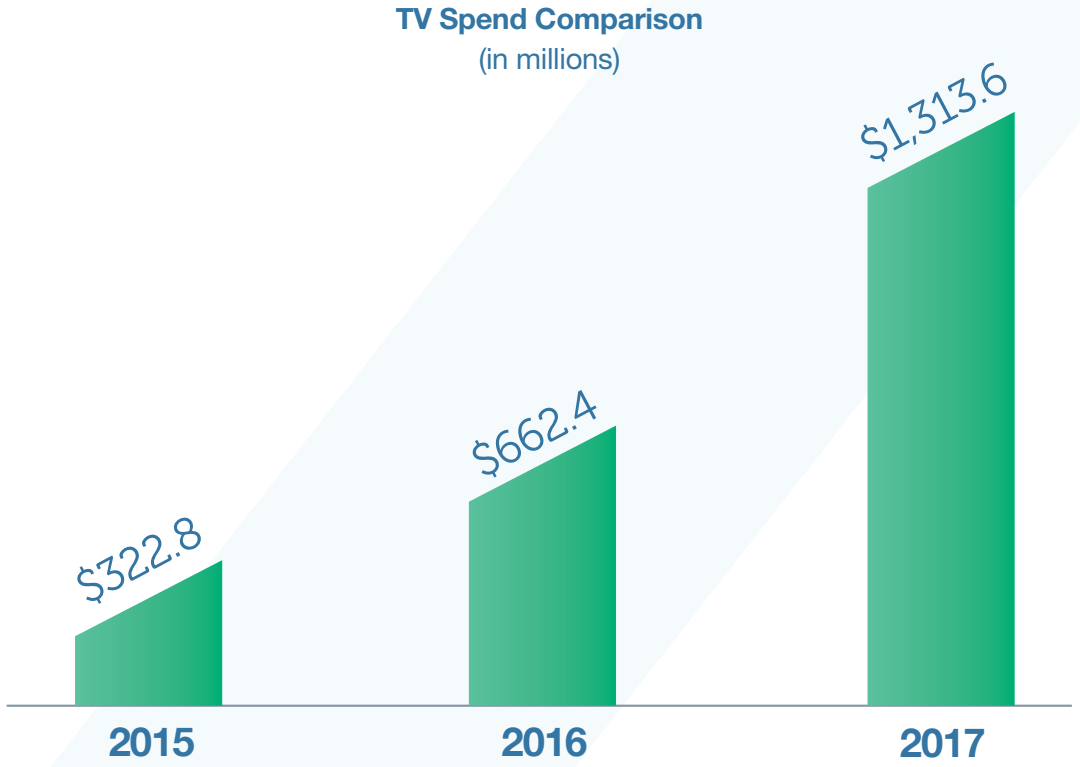
These 50 Direct-Disruptor Brands Collectively Spent Over $1.3 Billion on TV in 2017, A 98% Increase YOY

"Direct-disruptor" brands have accelerated spending recently in this very competitive environment, having invested over $650MM more in TV over the last year



Source: VAB analysis of Nielsen Ad Intel data, calendar year 2015-2017. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndication TV. Reflects the cume TV spend of the 50 direct brands identified in this report. All 50 companies existed since 2015, except for Hubble, which was founded in 2016.

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Television Has Driven Many Business Successes Across The 50 "Direct-Disruptor" Brands Analyzed

Plated.

How 2 young guys went from the brink of bankruptcy to selling their 'Shark Tank' business for $300 million

talkspace

Israeli-founded TalkSpace Raises $31m for Online Psychotherapy

ibotta

Denver's Ibotta lands big investor, plans hiring spree

STITCH FIX

Stitch Fix, With Nearly $1 Billion In Sales, Files For An IPO

PELOTON

Peloton's CEO Talks Big Funding, Expansion, and an IPO

BOMBAS

BOMBAS SOCKS ON SHARK TANK GOES FROM $450,000 TO $50 MILLION IN SALES

Thumbtack

Thumbtack Becomes Latest Unicorn, Raises $125 Million At $1.25 Billion Valuation

TRUE

Bra startup True&Co sold to Calvin Klein owner PVH

chewy.com

PetSmart is acquiring Chewy.com for $3.35 billion in the largest e-commerce acquisition ever

OfferUp

Craigslist Rival OfferUp is Tech's Latest Unicorn

"Emerging" Direct-Disruptor Brands

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"Emerging" Direct-Disruptor Brands

These 34 "emerging" direct-disruptor brands are an average of eight years old and have been investing in TV only since 2015 (two years on average)

- Most "emerging" direct-disruptor brands saw their online traffic explode as soon as they launched an initial TV campaign
- For these newer direct-disruptor brands, TV jumpstarts online conversation, exploration and viewing centered around the brands themselves
- Most brands in this group are private companies that have recently begun to utilize TV as a key part of their media mix

"Emerging" Direct-Disruptor Brands

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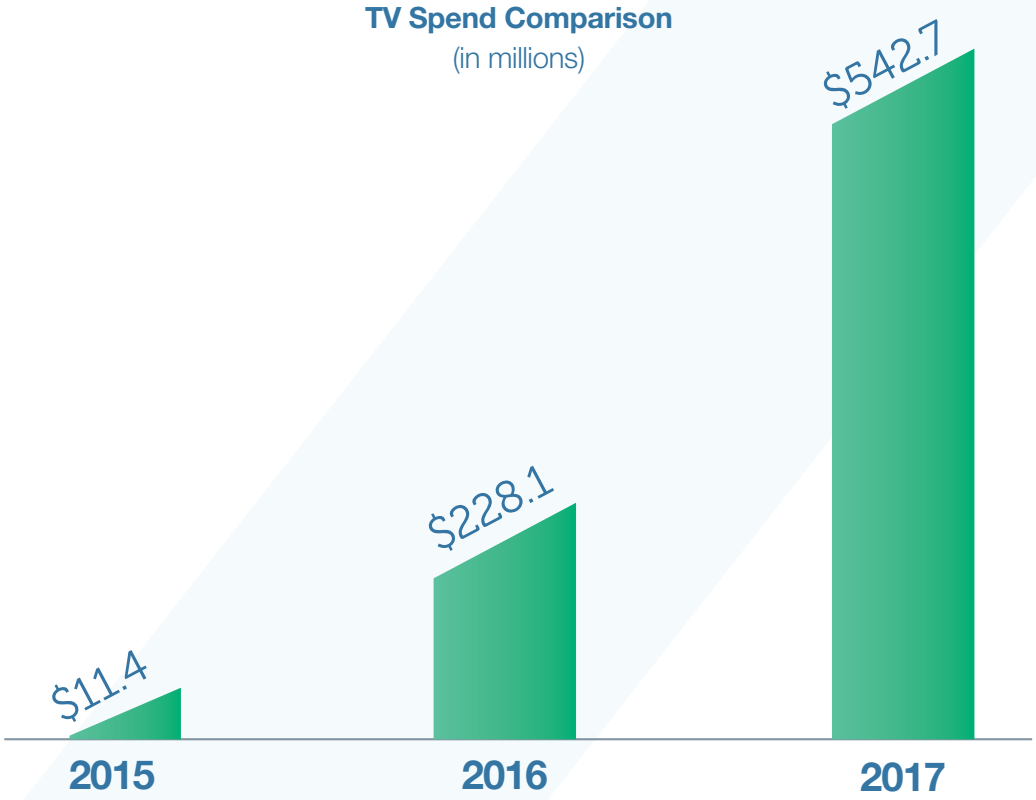
These 34 "Emerging" Brands Collectively Spent over $500 Million on TV in 2017; A 138% Increase YOY

"Emerging" direct-disruptor brands have accelerated spending recently in this very competitive environment, having invested over **$300MM** more in TV over the last year



Source: VAB analysis of Nielsen Ad Intel data, calendar year 2015-2017. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndication TV. Reflects the cume TV spend of the 34 direct brands identified in this report. All 34 companies existed since 2015, except for Hubble, which was founded in 2016.

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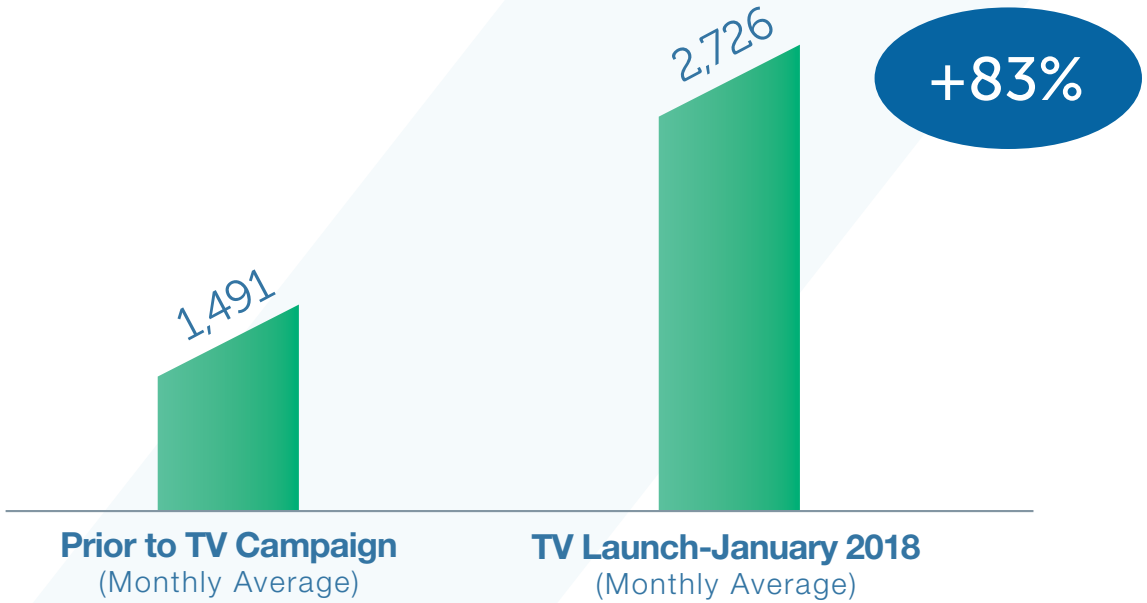
On Average, "Emerging" Brands Saw a 83% Lift in Their Unique Website Traffic After They Launched a TV Campaign

"Emerging" brands saw a continual lift in their website traffic that spans their initial TV launch to present day

"Emerging" Direct-Disruptor Brands

Average Monthly Website Unique Visitors (000)

Based over a Three-Year Time Period: Feb'15 – Jan '18



Based on the 29 brands within the "emerging" direct-disruptor brands segment that are measured in comScore

Source: VAB analysis of comScore MediaMetrix multi-platform media trend data; total audience (Desktop P2+, Mobile 18+), February '15 – January '18 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '15 – Jan '18 (calendar months).

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Website Traffic Skyrocketed for Many "Emerging" Brands as Soon as They Launched a TV Campaign

Monthly Website Unique Visitors (000) Comparison

Based Over A Three-Year Time Period (Feb '15 – Jan '18)

Company	Monthly Average: Prior To TV Launch	Monthly Average: TV Launch – Jan '18	% Difference
Blink Health	261	449	+72%
Chewy	1,732	5,570	+222%
Eloquii	165	200	+21%
Flipp	2,133	6,835	+221%
Harry's	764	1,118	+46%
Hubble	N/A	305	↑
MileIQ	N/A	1,049	↑
MVMT	192	912	+375%
Nerdwallet	4,269	12,005	+181%
OfferUp	N/A	4,791	↑
Poshmark	5,865	10,680	+82%
Remitly	117	269	+130%
Saatva	184	343	+86%
Stitch Fix	1,151	2,241	+95%
Sun Basket	197	479	+143%
ThredUp	2,554	2,991	+17%
Top Hatter	1,891	4,317	+128%

Source: VAB analysis of comScore media metrix multi-platform media trend data; total audience (Desktop P2+. Mobile 18+), February '15 – January '18 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '15– Jan '18 (calendar months). N/A = not enough traffic for comScore to measure.

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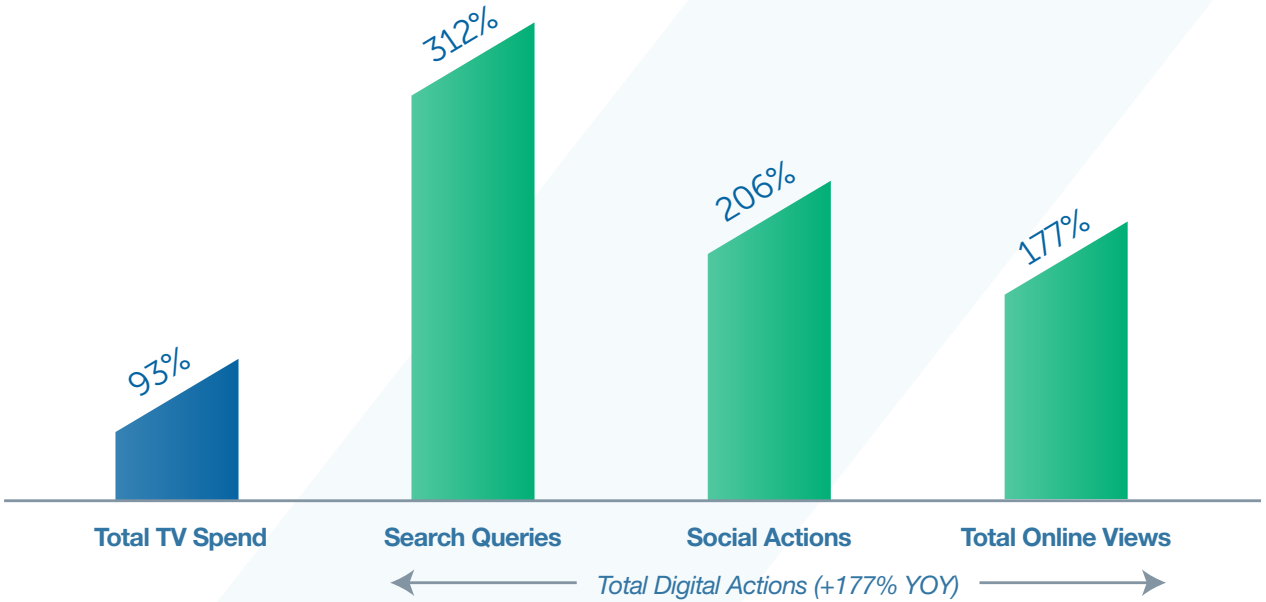
TV Is the Catalyst That Jumpstarts Greater Conversation, Exploration & Viewing of Their Advertising Online

TV leads to increased searches, social actions and non-paid online video views of a brand's TV ad. In fact, these digital actions in total far outpace the collective increase in TV spend across the 22 measured "emerging" direct brands.

22 "Emerging" Direct-Disruptor Brands: TV Spend vs. "Digital Actions" YOY % Increase

2016 vs. 2017



22 brands reflect the number measured in iSpot.tv that also had TV spending in both 2016 & 2017 for comparison purposes.

Source: TV spending based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & 2017. Digital actions based on VAB analysis of iSpot.tv data and reflects TV commercial-related searches (Google, Bing, Yahoo!), social actions (posts, likes, shares and comments related to TV ads on Facebook, Twitter, YouTube, iSpot.tv) and earned, not promoted, online video views of TV ads (YouTube, iSpot.tv). Digital actions are correlated to TV ad airing data.

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Most Brands Saw Across-The-Board Lifts in Online Metrics Related to Their Ads as They Increased Their TV Investment

Sampling of Brands: TV Spend vs. "Digital Actions" YOY % Increase

2016 vs. 2017

Brand	TV Spend	Search Queries	Social Actions	Total Online Views
CheapCaribbean.com	+121%	+12,362%	+558%	+1,879%
Dermstore	+150%	+34%	+174%	+616%
Dia & Co	+5,815%	+2,282%	+77,000%	+7,512%
Green Chef	+801%	+1,310%	+109%	+199%
gwynnie bee	+141%	+117%	+232%	+79%
Harry's	+155%	+322%	+25,120%	+74,575%
Home Chef	+2,246%	+626%	+475%	+2,158%
Saatva	+216%	+417%	+73%	+6,145%
Top Hatter	+845%	+768%	+26,300%	+751%
UNTUCKit	+69%	+132%	+764%	+6,715%

Source: TV spending based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & 2017. Digital actions based on VAB analysis of iSpot.tv data and reflects TV commercial-related searches (Google, Bing, Yahoo!), social actions (posts, likes, shares and comments related to TV ads on Facebook, Twitter, YouTube, iSpot.tv) and earned, not promoted, online video views of TV ads (YouTube, iSpot.tv). Digital actions are correlated to TV ad airing data.

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"Emerging" Brands Often See Their Revenues Take Off When They Launch a TV Campaign or Increase Their Investment

Company			2016	2017	YoY Diff	
leesa	(TV launch: 2016)	TV Spend (000):	$13,560	$63,480	$49,920	
		Revenue (000):	$80,000	$150,000	$70,000	+88%
Founded in 2014						
HOME CHEF	(TV launch: 2016)	TV Spend (000):	$574	$13,467	$12,893	
		Revenue (000):	$200,000	$300,000	$100,000	+50%
Founded in 2013						
LE TOTE	(TV launch: 2017)	TV Spend (000):	– – –	$3,438	$3,438	
		Revenue (000):	$100,000	$150,000	$50,000	+50%
Founded in 2012						
MVMT	(TV launch: 2017)	TV Spend (000):	– – –	$2,670	$2,670	
		Revenue (000):	$60,000	$80,000	$20,000	+33%
Founded in 2013						

% *=revenue increase between 2016 & 2017*

Source: Revenues reflect estimated revenue data from Pivotal Research. TV spend based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & 2017.

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"Emerging" Brands Often See Their Revenues Take Off When They Launch a TV Campaign or Increase Their Investment

Company			2016	2017	YoY Diff	
POSHMARK *Founded in 2011*	(TV launch: 2017)	**TV Spend (000):**	---	$535	$535	
		Revenue (000):	$50,000	$100,000	$50,000	+100%
STITCH FIX *Founded in 2011*	(TV launch: 2017)	**TV Spend (000):**	---	$22,846	$22,846	
		Revenue (000):	$872,327	$1,090,163	$217,836	+25%
saatva *Founded in 2010*	(TV launch: 2016)	**TV Spend (000):**	$448	$1,417	$969	
		Revenue (000):	$180,000	$200,000	$20,000	+11%

% *=revenue increase between 2016 & 2017*

Source: Revenues reflect estimated revenue data from Pivotal Research. TV spend based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & 2017.

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"Emerging" Brands Often See Their Revenues Take Off When They Launch a TV Campaign or Increase Their Investment

Company			2016	2017	YoY Diff	
SUN BASKET	(TV launch: 2017)	TV Spend (000):	---	$605	$605	
		Revenue (000):	$124,000	$275,000	$151,000	+122%
Founded in 2014						
TOPHATTER	(TV launch: 2016)	TV Spend (000):	$553	$5,227	$4,674	
		Revenue (000):	$40,000	$100,000	$60,000	+150%
Founded in 2012						
TOUCH OF MODERN	(TV launch: 2017)	TV Spend (000):	---	$852	$852	
		Revenue (000):	$118,000	$150,000	$31,200	+26%
Founded in 2012						

% *=revenue increase between 2016 & 2017*

Source: Revenues reflect estimated revenue data from Pivotal Research, with the exception of Top Hatter which is based on analyst estimates per Fortune (5/11/17). TV spend based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & 2017.

“Expanding”
Direct-Disruptor Brands

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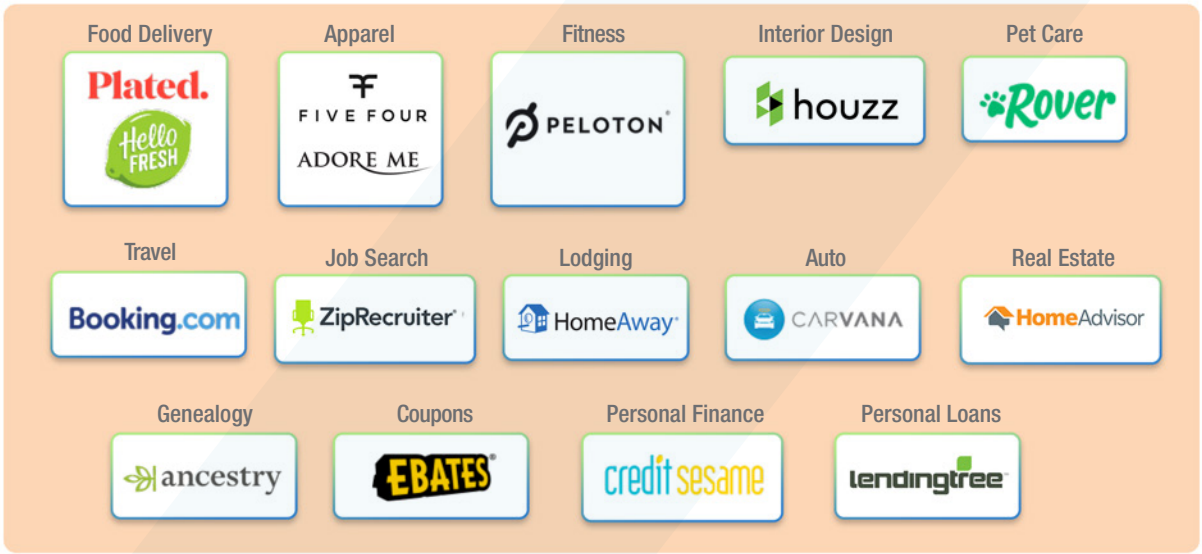
"Expanding" Direct-Disruptor Brands

These 16 "expanding" direct-disruptor brands are an average of 15 years old and have been investing in TV for at least the last four years (eight years on average)

- There is a strong correlation between TV spend and website traffic within their TV advertising continuity
- For these more established brands, TV continues to be a key driver of search queries
- Correlations also exist between TV spend increases and increased revenues

"Expanding" Direct-Disruptor Brands



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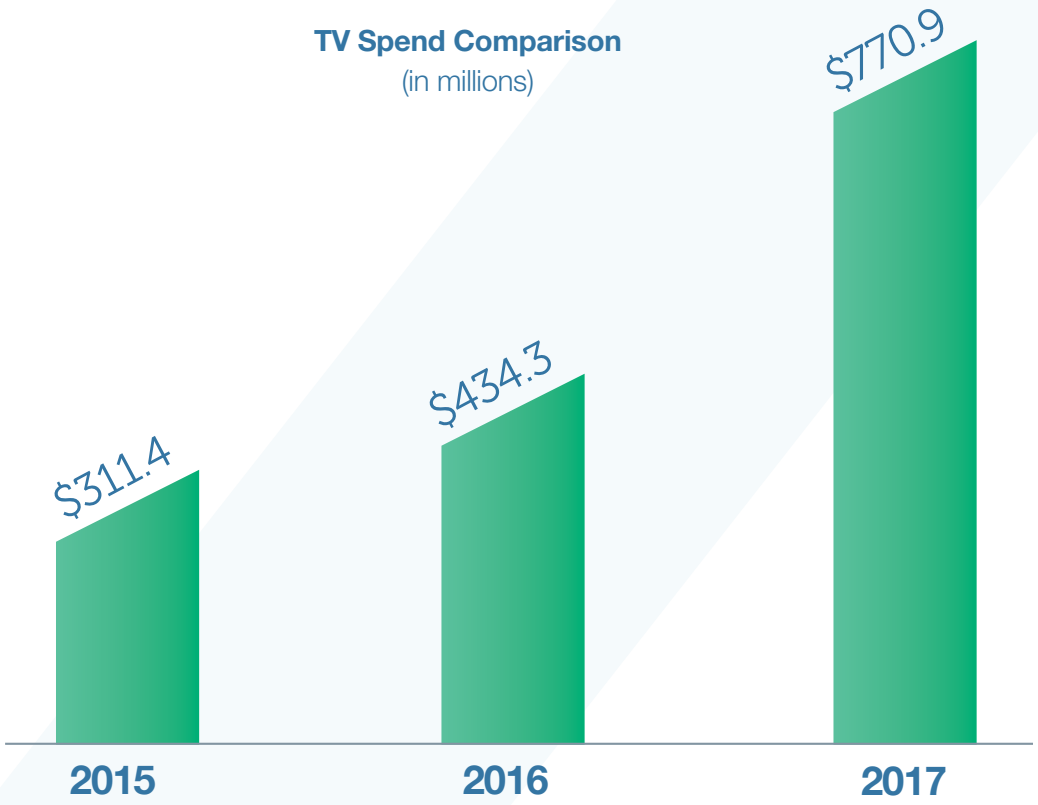
These 16 "Expanding" Brands Collectively Spent Almost $800 Million on TV in 2017, A 78% Increase YOY

"Expanding" direct-disruptor brands have invested over **$300MM** more in TV over the last year



Source: VAB analysis of Nielsen Ad Intel data, calendar year 2015-2017. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndication TV. Reflects the cume TV spend of the 16 "expanding" direct brands identified in this report.

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There Is a Definitive Correlation Between TV Spend & Website Traffic for These "Expanding" Brands

12 of the 15 Measured "Expanding" Direct-Disruptor Brands (80%) Analyzed Exhibited a Direct Correlation Between TV Spend & Website Traffic

12 Brands

Correlation between TV Spend & Monthly Unique Visitors

3 Brands

Lack of correlation between TV Spend & Monthly Unique Visitors

*analysis excludes "Five Four" brand which wasn't measured in comScore during the time period

Source: VAB analysis of comScore Media Metrix Multi-Platform media trend data; total audience (Desktop P2+, Mobile 18+), February '16 – January '18 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '16 – Jan '18 (calendar months).

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TV Drives Online Traffic for "Expanding" Brands That Have a Continual Advertising Presence

The below chart reflects the shifts in spend and online traffic for brands that were active on TV every month, or nearly every month, for the last two years

TV Spend Up, Website Traffic Up

(Year-Over-Year Comparison: Feb '16 – Jan '17 vs. Feb '17 – Jan '18)

	PELOTON	HelloFRESH	Rover
Avg Monthly TV Spend (000):			
Feb '16 - Jan '17:	$3,784	$2,296	$225
Feb '17 – Jan '18:	$9,204	$2,898	$1,273
% Difference:	+143%	+26%	+446%
Avg Monthly Unique Visitors (000):			
Feb '16 - Jan '17:	96	1,703	973
Feb '17 – Jan '18:	236	2,096	2,072
% Difference:	+147%	+23%	+113%

Source: VAB analysis of comScore Media Metrix multi-platform media trend data; total audience (Desktop P2+, Mobile 18+), February '16 – January '18 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '16 – Jan '18 (calendar months).

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(Year-Over-Year Comparison: Feb '16 – Jan '17 vs. Feb '17 – Jan '18)

	HomeAdvisor	Booking.com	credit sesame
Avg Monthly TV Spend (000):			
Feb '16 - Jan '17:	$5,174	$2,667	$247
Feb '17 – Jan '18:	$6,358	$6,320	$1,200
% Difference:	**+23%**	**+137%**	**+386%**

Avg Monthly Unique Visitors (000):			
Feb '16 - Jan '17:	4,631	12,138	5,458
Feb '17 – Jan '18:	6,201	16,963	6,680
% Difference:	**+34%**	**+40%**	**+22%**

Source: VAB analysis of comScore media Metrix Multi-Platform media trend data; total audience (Desktop P2+, Mobile 18+), February '16 – January '18 (calendar months). VAB analysis of Nielsen Ad Intel data, TV spend data (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '16 – Jan '18 (calendar months).

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For These More Established Direct-Disruptor Brands, Increased TV Activity Drives Search Queries

Sampling of Brands: TV Spend vs. Search Queries YOY % Increase

2016 vs. 2017

Brand	TV Spend	Search Queries
Ancestry	+27%	+76%
Booking.com	+124%	+177%
Ebates	+26%	+117%
Home Advisor	+24%	+180%
Home Away	+23%	+319%
Houzz	+1,513%	+1,200%
Lending Tree	+15%	+275%
Peloton	+219%	+341%
Rover	+391%	+455%
Zip Recruiter	+103%	+188%

Source: TV spending based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016-2017. Digital actions based on VAB analysis of iSpot.tv data and reflects TV commercial-related searches (Google, Bing, Yahoo!). Digital actions are correlated to TV ad airing data.

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"Expanding" Brands Often See Their Revenues Take Off When They Increase Their TV Investment

Company			2016	2017	YoY Diff	
Hello Fresh *Founded in 2011*	(TV launch: 2015)	TV Spend (000):	$26,132	$35,915	$9,782	
		Revenue (000):	$663,324	$1,008,989	$345,665	+52%
PELOTON *Founded in 2012*	(TV launch: 2014)	TV Spend (000):	$34,051	$108,708	$74,657	
		Revenue (000):	$170,000	$340,000	$170,000	+100%
ADORE ME *Founded in 2011*	(TV launch: 2015)	TV Spend (000):	$38,927	$73,168	$34,241	
		Revenue (000):	$80,000	$100,000	$20,000	+25%
FIVE FOUR *Founded in 2002*	(TV launch: 2015)	TV Spend (000):	$242	$1,533	$1,290	
		Revenue (000):	$50,000	$100,000	$50,000	+100%

% *=revenue increase between 2016 & 2017*

Source: Revenues are based on estimated revenue data from Pivotal Research (Hello Fresh, Peloton, Five Four, Adore Me). TV spend based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & CY 2017.

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"Expanding" Brands Often See Their Revenues Take Off When They Increase Their TV Investment

Company			2016	2017	YoY Diff	
lendingtree *Founded in 1998*	(TV launch: 1999)	TV Spend (000):	$23,378	$26,932	$3,554	
		Revenue (000):	$384,402	$617,736	$233,334	+61%
ancestry *Founded in 1983*	(TV launch: 2000)	TV Spend (000):	$95,809	$121,624	$25,815	
		Revenue (000):	$850,000	$1,000,000	$150,000	+18%
HomeAway *Founded in 2005*	(TV launch: 2009)	TV Spend (000):	$12,244	$15,015	$2,771	
		Revenue (000):	$689,000	$906,000	$217,000	+31%
CARVANA *Founded in 2013*	(TV launch: 2013)	TV Spend (000):	$15,833	$31,791	$15,958	
		Revenue (000):	$365,148	$858,870	$493,722	+135%

% =*revenue increase between 2016 & 2017*

Source: Revenues are based on the following – company filings (10-K) for U.S. revenue via SEC.gov (LendingTree, HomeAway, Carvana), and analyst estimates per Forbes & NASDAQ global newswire (9/12/17) for Ancestry.com. TV spend based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & CY 2017.

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Key Takeaways

Food delivery. Contact lenses. Fitness. Personal Shopping. Pet care. Today, many categories are being transformed by new product entrants that are forgoing traditional supply chains and developing “one-to-one” relationships directly with consumers.

By their nature, these data-driven, direct-disruptor brands have all had an active digital presence since their inception. Whether through owned, earned and, in many cases, paid media, these brands have built and maintained a consumer-facing digital footprint since day one.

However, when these brands wanted to build market share beyond a core, albeit limited, customer base they added TV as a critical component of their media mix. In short, TV is where these brands went to grow big.

Brands saw immediate positive business outcomes as they entered and expanded their presence in TV, and the proof is in the numbers. For instance, “emerging” brands saw an 83% average lift in their website traffic once they launched TV while “expanding” brands saw triple-digit increases in their search volume. Of course, brands in both segments saw significant revenue growth as well.

These performance-driven companies know exactly what media works for driving their business and it’s why these 50 direct-disruptors have collectively doubled their TV spending each of the last two years.

Television. Be Known.

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